

2014 Whaling Study United Kingdom and Germany

Sponsored by:

Animal Welfare Institute (AWI)

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Whale and Dolphin Conservation (WDC)

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Table of Contents

	<u>Page</u>
Objectives & Methodology.....	3
Executive Summary.....	5
Detailed Findings.....	11

Objectives & Methodology

- This study was intended to:
 - Gauge respondents agreement with the resumption of Iceland's commercial whaling practices
 - Measure the likelihood of respondents to:
 - Purchase seafood products from a company known to be linked to whaling
 - Eat at restaurants or shop at supermarkets that serve/sell whale meat
 - Take a whale-watching tour if they were to visit Iceland
 - Take a whale-watching tour if they were to visit Iceland, knowing that they may see whales being killed or dead whales being transported back to shore by a whaling operation

Objectives & Methodology (cont'd.)

- The 2014 Whaling Study was conducted in two countries: The U.K. and Germany

U.K.

- An online survey was conducted among an Internet representative U.K. sample of 1,001 adults comprising 500 men and 501 women 18 years of age and older.
- This survey was conducted from July 25-30, 2014.
- Completed interviews are weighted by three variables: age, sex and geographic region to ensure reliable and accurate representation of the total U.K. population, 18 years of age and older.

Germany

- An online survey was conducted among an Internet representative German sample of 1,000 adults comprising 501 men and 499 women 18 years of age and older.
- This survey was conducted from July 25-30, 2014.
- Completed interviews are weighted by three variables: age, sex and geographic region to ensure reliable and accurate representation of the total U.K. population, 18 years of age and older.
- Respondents for this survey were selected from among those who have volunteered to participate in online surveys and polls. Because the sample is based on those who initially self-selected for participation, no estimates of sampling error can be calculated. All sample surveys and polls may be subject to multiple sources of error, including, but not limited to sampling error, coverage error, error associated with nonresponse, and error associated with question wording and response options and post-survey weighting and adjustments.
- Results among demographic subgroups are noted **in red** in this report where statistically significant differences exist at the 95% confidence level.

Executive Summary

Executive Summary

When presented with the information that Iceland has started their whale hunting season and they intend to kill as many as 770 fin whales over 5 years in spite of an international ban...

THE MAJORITY OF RESPONDENTS DISAGREE WITH THE RESUMPTION OF COMMERCIAL WHALING IN ICELAND

- Nine in ten people in both the U.K. and Germany disagree with Iceland's actions to resume commercial whaling
 - Almost 4 out of 5 people in Germany disagree strongly, and only slightly fewer in the U.K. feel the same way
- Over 90 percent of females in the U.K. and Germany disagree with Iceland resuming commercial whaling and almost as many males disagree
 - Females in Germany are significantly more likely than males to indicate that they disagree strongly (83% vs. 74%), while men and women in the U.K. are at comparable levels
- In both countries, 80 percent or more in each age group disagree with Iceland's resumption of commercial whaling
 - Those age 18-34 in the U.K. (17%) and Germany (16%) are more likely to indicate that they agree with Iceland resuming commercial whaling practices versus those age 35 and older (U.K., Germany—both 7%)

Executive Summary (cont'd.)

When informed that Iceland's fin whaling company is closely linked to one of the largest seafood companies in Iceland which exports fish and seafood products to countries including the U.K. and Germany...

MOST ARE UNLIKELY TO PURCHASE SEAFOOD PRODUCTS FROM THIS COMPANY

- More than 4 out of 5 people in each country are unlikely to purchase seafood products from these companies, including more than half of the respondents who are very unlikely
 - Only four percent in the U.K. and two percent in Germany would be very likely to purchase seafood products
- A higher percentage of females than males in both the U.K. and Germany indicate being unlikely to purchase seafood from a company linked to whaling. The difference between men and women is significant in Germany (88% vs. 83%)
- At least 8 in 10 in each age group would consider themselves unlikely to purchase seafood from a company linked to whaling
 - Those significantly most likely to purchase from a company linked to whaling are age 18-24 in the U.K. (20%) and age 18-34 in Germany (19%)

Executive Summary (cont'd.)

When told that Iceland has a number of restaurants and supermarkets that sell whale meat... MOST ARE UNLIKELY TO SUPPORT ESTABLISHMENTS THAT SERVE OR SELL WHALE MEAT

- Over 85 percent of people in both the U.K. and Germany indicate that they are unlikely to eat at restaurants or visit supermarkets that sell whale meat
 - Sixty-three percent in the U.K. and fifty-nine percent in Germany indicate that they are very unlikely
- While the majority within each gender indicate being unlikely to support these establishments, females are significantly less likely compared to males in both the U.K. and Germany, with over 90 percent indicating this
- Though at least 7 in 10 in each age group would be unlikely to support these establishments, those age 35 and older in both the U.K. and Germany are significantly more likely to say so than those age 18-34
 - Those age 55+ in the U.K. (74%) are significantly more likely than all other age groups in the U.K. to indicate that they are very unlikely

Executive Summary (cont'd.)

When informed that Iceland has a number of companies providing whale-watching tours to provide residents and tourists an opportunity to observe and learn about Iceland's marine mammals...

MOST WOULD BE INTERESTED IN TAKING A WHALE-WATCHING TOUR

- Over 60 percent in the U.K. and over 70 percent in Germany would be likely to take a whale watching tour if they travelled to Iceland
 - About 1 out of 4 adults in each country indicate that they are very likely
- Equal percentages of males and females in the U.K. (24%) and nearly equal percentages in Germany (Males—26%, Females—27%) indicate that they would be very likely
- Over half of respondents in each age group indicate being likely to take a whale-watching tour if they traveled to Iceland.
 - Most likely are people age 45-54 in the U.K. (69%) and those age 35-44 in Germany (77%), while those least likely are people age 55+ in the U.K. (42%) and those age 18-24 in Germany (33%)

Executive Summary (cont'd.)

After being told that in many parts of Iceland, whalers are not prevented from killing whales near whale-watching vessels, and there was a possibility of seeing a whale being killed or dead whales transported back to shore while on a whale-watching trip...

LARGE MAJORITY UNLIKELY TO STILL PARTICIPATE IN A WHALE-WATCHING EXCURSION

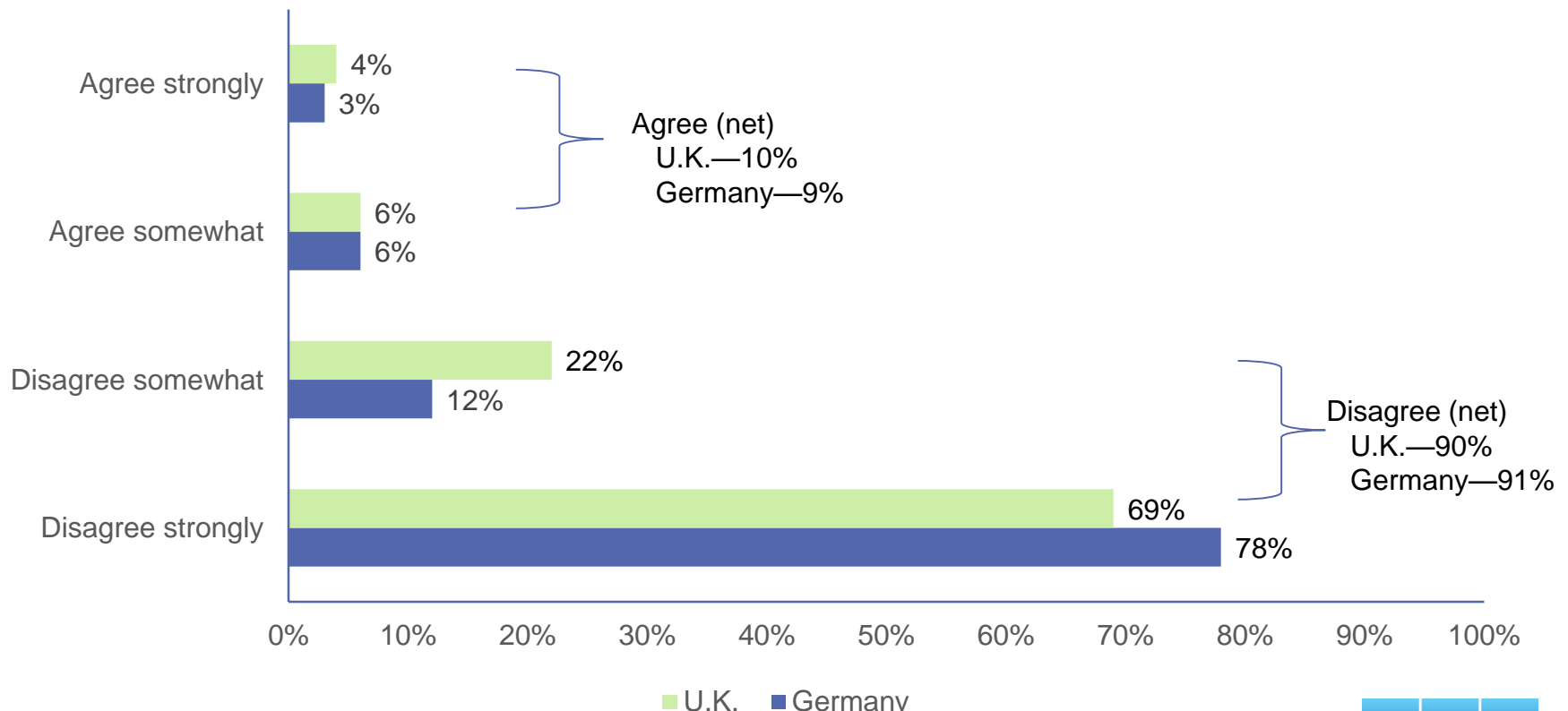
- Close to 9 in 10 indicate they are unlikely to take a whale-watching excursion if there was a possibility of seeing whales being killed or dead whales being transported back to shore
 - Almost equal percentages in the U.K. (68%) and Germany (67%) indicate being very unlikely
- In both countries, a significantly higher percentage of females indicate being very unlikely (U.K.—72%, Germany—76%)
- Ninety-two percent of those age 55+ in the U.K. and 91 percent of those age 45+ in Germany indicate being unlikely to take a whale-watching excursion near a whalers
 - Those age 55+ in the U.K. are significantly more likely than all other age groups to indicate being very unlikely

Detailed Findings

Attitudes Toward Commercial Whaling in Iceland

Majority Disagree With Commercial Whaling

- Nine in ten people in both the U.K. and Germany disagree with Iceland's actions to resume commercial whaling
 - Almost 4 out of 5 people in Germany disagree strongly, and only slightly fewer in the U.K. feel the same way

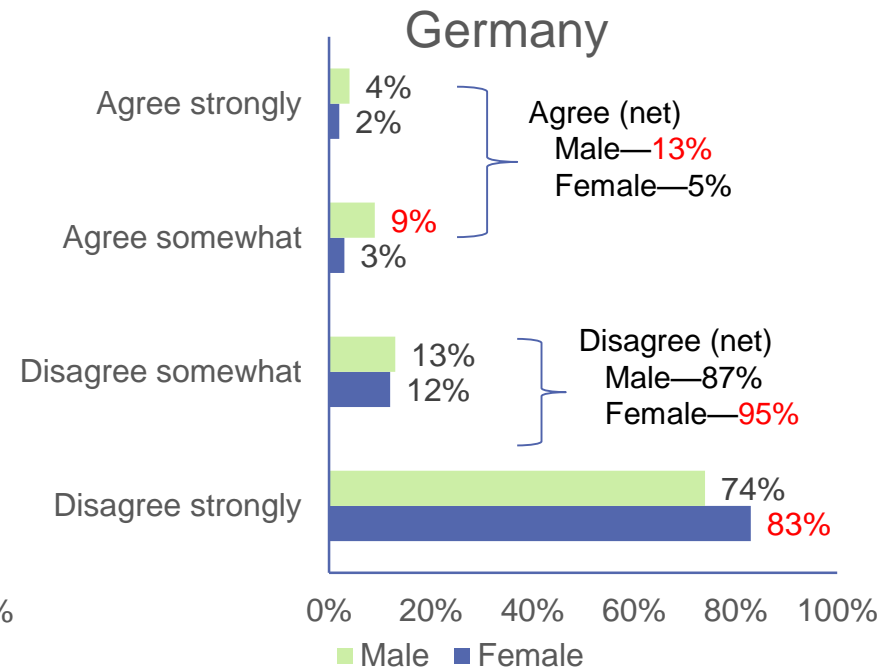
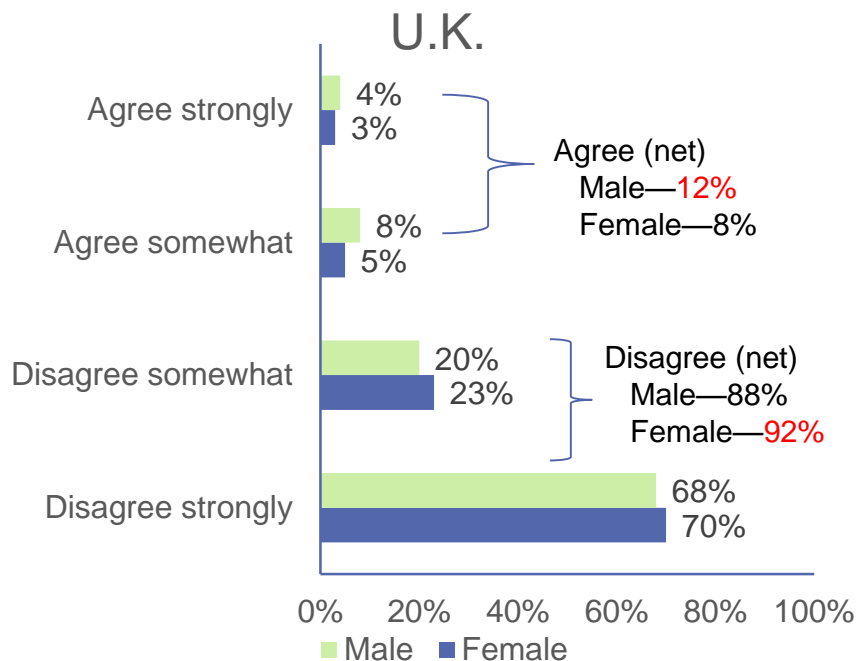


W1: Iceland (the country) has resumed commercial whaling (killing) of endangered fin whales. To what extent do you agree or disagree with their actions? (Base=Total, U.K.= 1,001, Germany = 1,000)

Attitudes Toward Commercial Whaling in Iceland

Females Have Stronger Feelings Against Whaling

- Over 90 percent of females in the U.K. and Germany disagree with Iceland resuming commercial whaling and almost as many males disagree
 - Females in Germany are significantly more likely than males to indicate that they disagree strongly (83% vs. 74%), while men and women in the U.K. are at comparable levels



W1: Iceland (the country) has resumed commercial whaling (killing) of endangered fin whales. To what extent do you agree or disagree with their actions? (Base=Total, U.K.= 1,001, Germany = 1,000)

Attitudes Toward Commercial Whaling in Iceland

Older People Are Less Likely To Agree With Whaling

- In both countries, 80 percent or more in each age group disagree with Iceland's resumption of commercial whaling
 - Those age 18-34 in the U.K. (17%) and Germany (16%) are more likely to indicate that they agree with Iceland resuming commercial whaling practices versus those age 35 and older (U.K., Germany—both 7%)

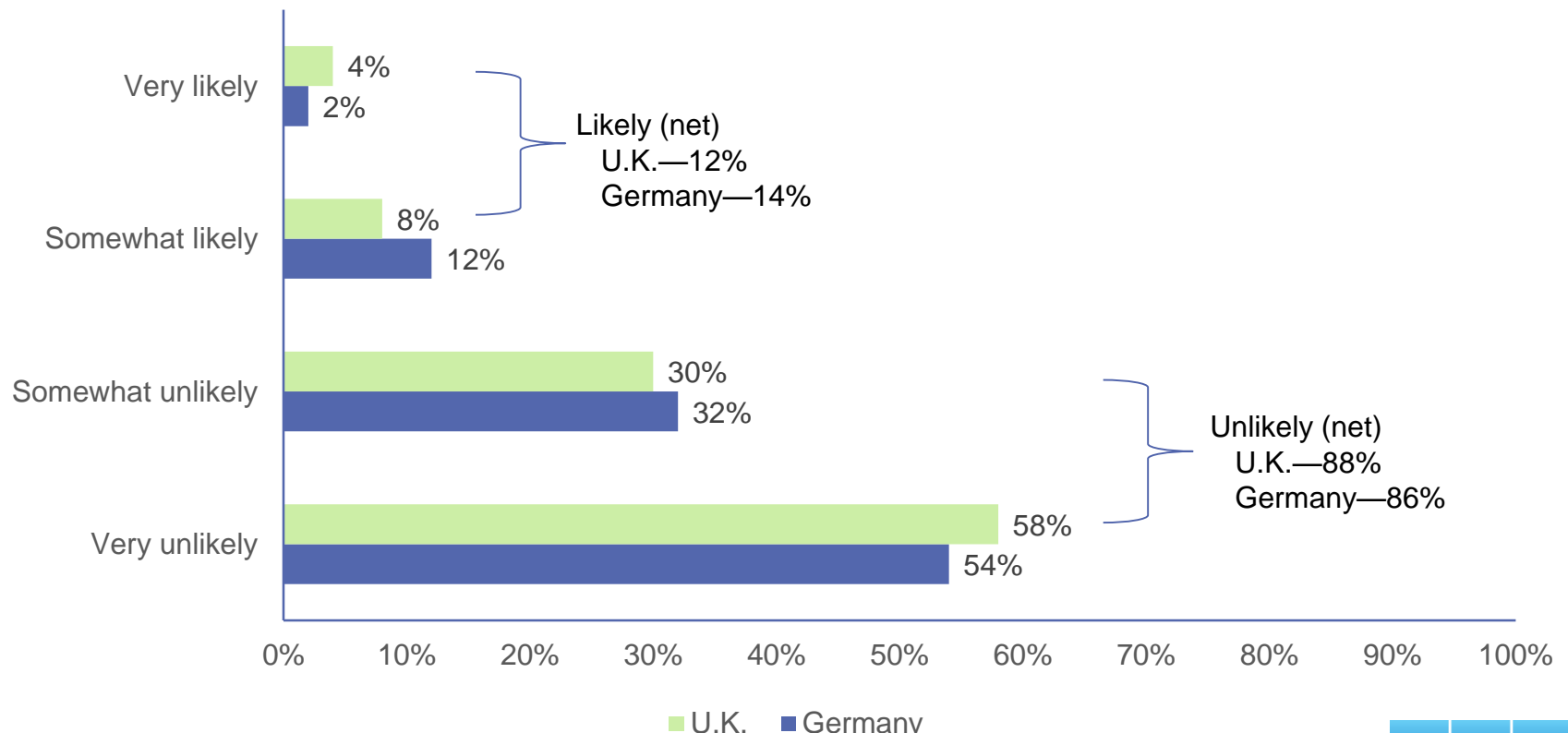
	U.K.					Germany				
	18-24	25-34	35-44	45-54	55+	18-24	25-34	35-44	45-54	55+
Agree (net)	17%	17%	10%	8%	5%	15%	17%	5%	4%	9%
Agree strongly	7%	7%	3%	2%	1%	6%	8%	2%	1%	2%
Agree somewhat	10%	9%	7%	6%	4%	9%	9%	3%	3%	7%
Disagree (net)	83%	83%	90%	92%	95%	85%	83%	95%	96%	91%
Disagree somewhat	22%	18%	23%	20%	23%	15%	10%	16%	12%	11%
Disagree strongly	60%	65%	68%	72%	72%	70%	73%	79%	84%	79%

W1: Iceland (the country) has resumed commercial whaling (killing) of endangered fin whales. To what extent do you agree or disagree with their actions? (Base=Total, U.K.= 1,001, Germany = 1,000)

Likelihood To Purchase From Company Linked to Whaling

Large Majority Unlikely To Purchase From Company Linked To Whaling

- More than 4 out of 5 people in each country are unlikely to purchase seafood products from these companies, including more than half of the respondents who are very unlikely
 - Only four percent in the U.K. and two percent in Germany would be very likely to purchase seafood products

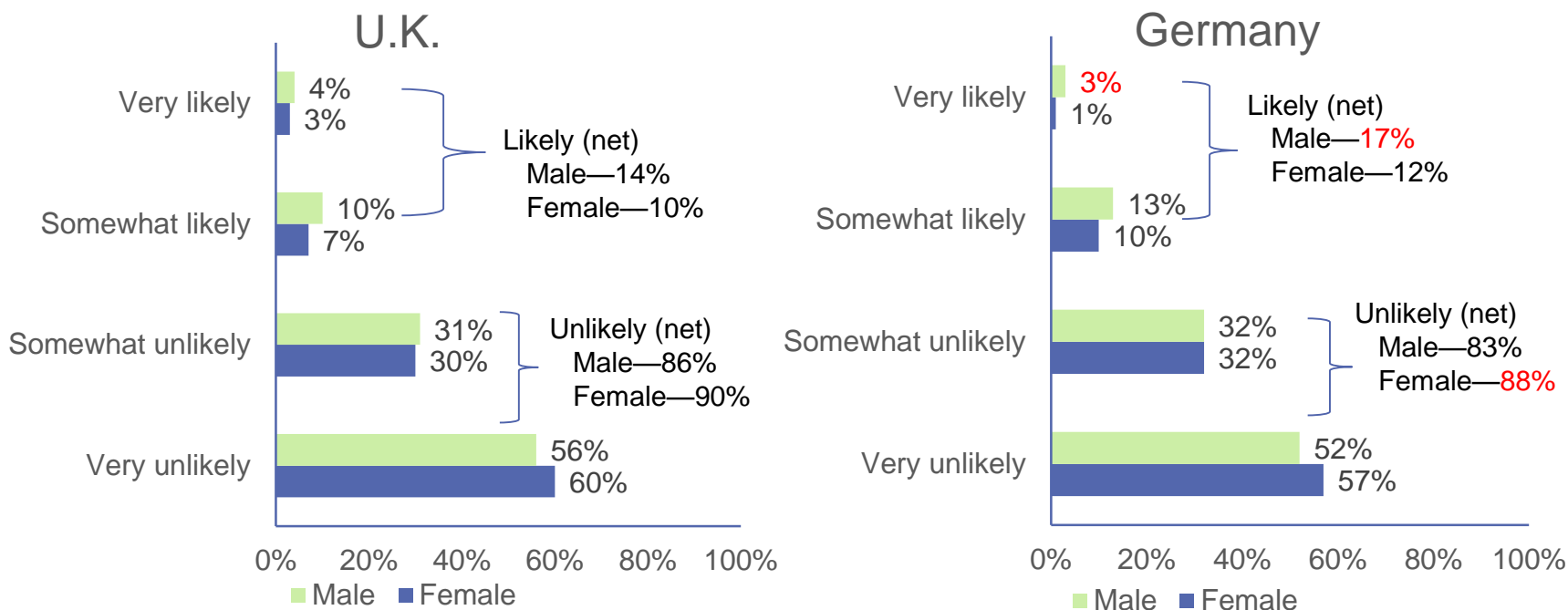


W2: How likely are you to purchase seafood products from a company known to be linked to whaling? (Base=Total, U.K.= 1,001, Germany = 1,000)

Likelihood To Purchase From Company Linked to Whaling

Females More Unlikely To Purchase From Company Linked To Whaling

- A higher percentage of females than males in both the U.K. and Germany indicate being unlikely to purchase seafood from a company linked to whaling. The difference between men and women is significant in Germany (88% vs. 83%)



W2: How likely are you to purchase seafood products from a company known to be linked to whaling? (Base=Total, U.K.= 1,001, Germany = 1,000)

Likelihood To Purchase From Company Linked to Whaling

Eight In Ten Unlikely To Purchase Seafood From Company Linked To Whaling

- At least 8 in 10 in each age group would consider themselves unlikely to purchase seafood from a company linked to whaling
 - Those significantly most likely to purchase from a company linked to whaling are age 18-24 in the U.K. (20%) and age 18-34 in Germany (19%)

	U.K.					Germany				
	18-24	25-34	35-44	45-54	55+	18-24	25-34	35-44	45-54	55+
Likely (net)	20%	13%	10%	13%	9%	19%	19%	10%	10%	15%
Very likely	7%	5%	2%	4%	2%	1%	5%	2%	2%	2%
Somewhat likely	13%	8%	8%	9%	6%	18%	14%	8%	8%	13%
Unlikely (net)	80%	87%	90%	87%	91%	81%	81%	90%	90%	85%
Somewhat unlikely	32%	34%	26%	33%	28%	33%	34%	32%	28%	33%
Very unlikely	48%	53%	63%	54%	63%	49%	47%	59%	62%	53%

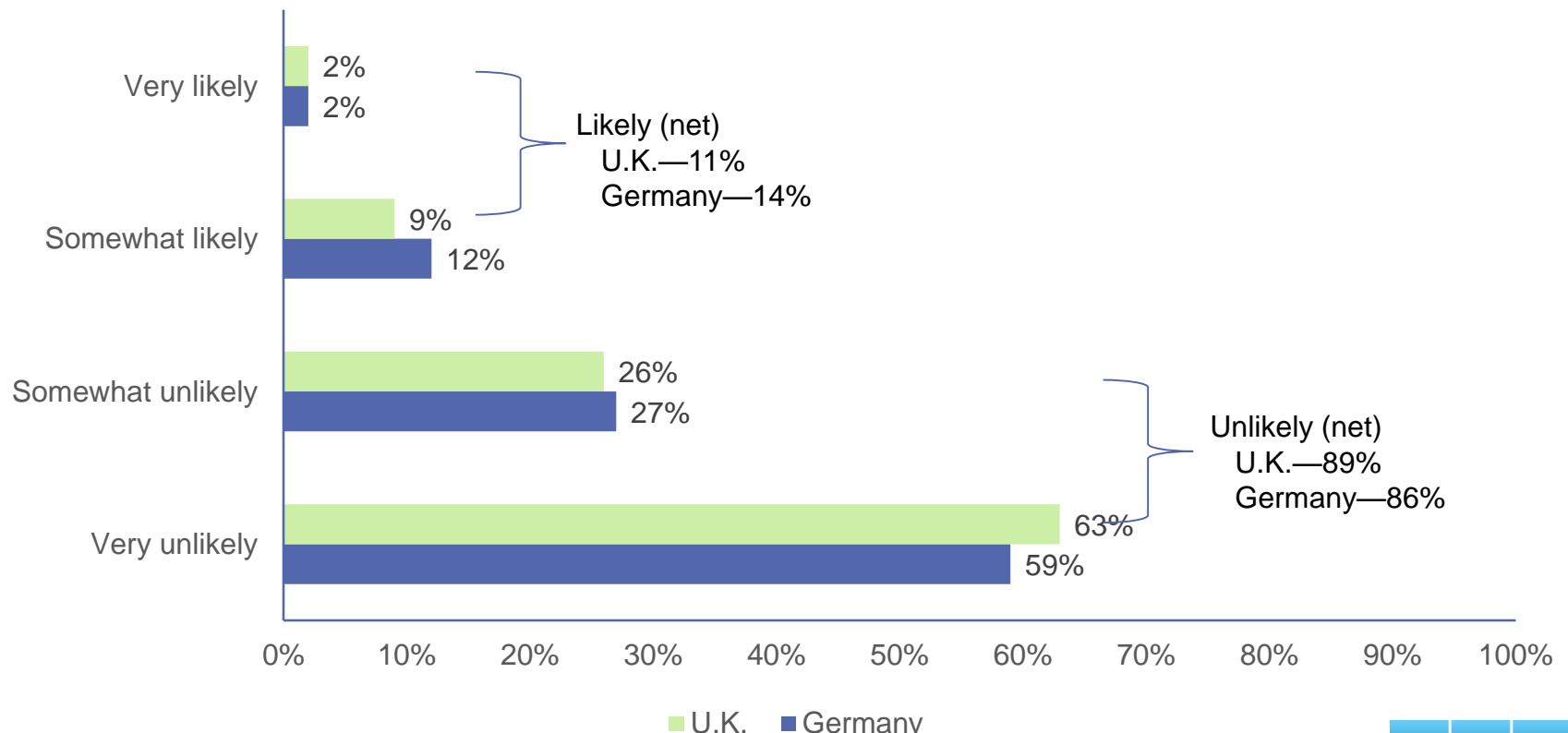
W2: How likely are you to purchase seafood products from a company known to be linked to whaling? (Base=Total, U.K.= 1,001, Germany = 1,000)



Likelihood to Choose Restaurants/Supermarkets That Sell Whale Meat

Most Unlikely To Support Establishments That Sell Whale Meat

- Over 85 percent of people in both the U.K. and Germany indicate that they are unlikely to eat at restaurants or visit supermarkets that sell whale meat
 - Sixty-three percent in the U.K. and fifty-nine percent in Germany indicate that they are very unlikely

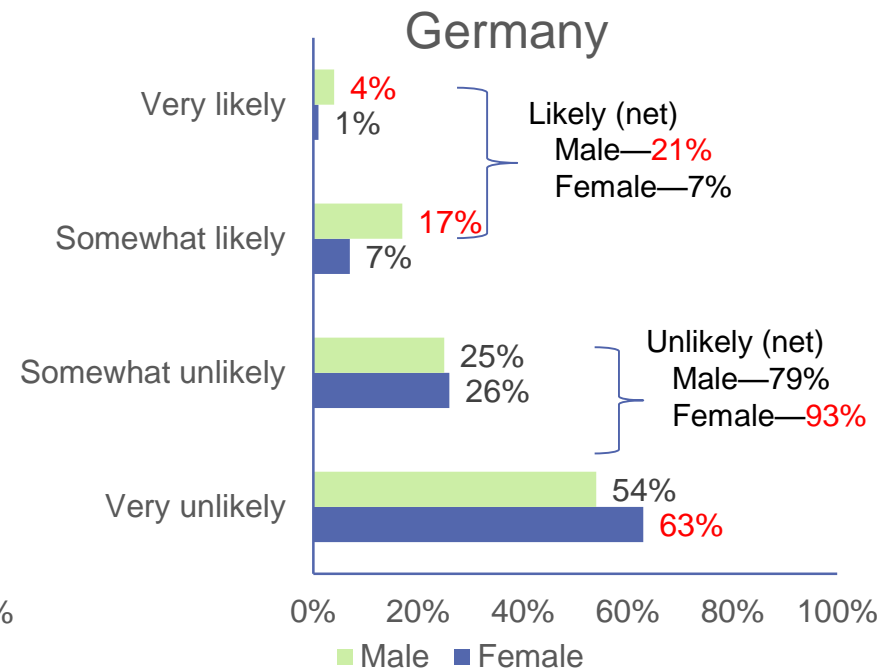
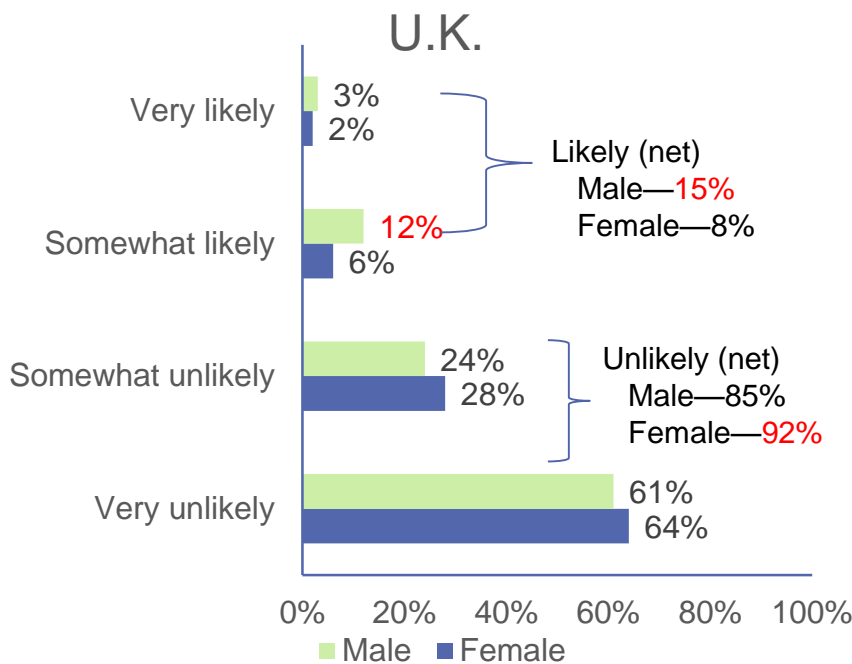


W3: If you traveled to Iceland, how likely would you be to choose to eat at restaurants that serve whale meat dishes or choose to visit supermarkets that sell whale meat? (Base=Total, U.K.= 1,001, Germany = 1,000)

Likelihood to Choose Restaurants/Supermarkets That Sell Whale Meat

Females Significantly Less Likely to Support Establishments That Sell Whale Meat

- While the majority within each gender indicate being unlikely to support these establishments, females are significantly less likely compared to males in both the U.K. and Germany, with over 90 percent indicating this



W3: If you traveled to Iceland, how likely would you be to choose to eat at restaurants that serve whale meat dishes or choose to visit supermarkets that sell whale meat? (Base=Total, U.K.= 1,001, Germany = 1,000)

Likelihood to Choose Restaurants/Supermarkets That Sell Whale Meat

Those Age 35+ Less Likely to Support Establishments That Serve Whale Meat

- Though at least 7 in 10 in each age group would be unlikely to support these establishments, those age 35 and older in both the U.K. and Germany are significantly more likely to say so than those age 18-34
 - Those age 55+ in the U.K. (74%) are significantly more likely than all other age groups in the U.K. to indicate that they are very unlikely

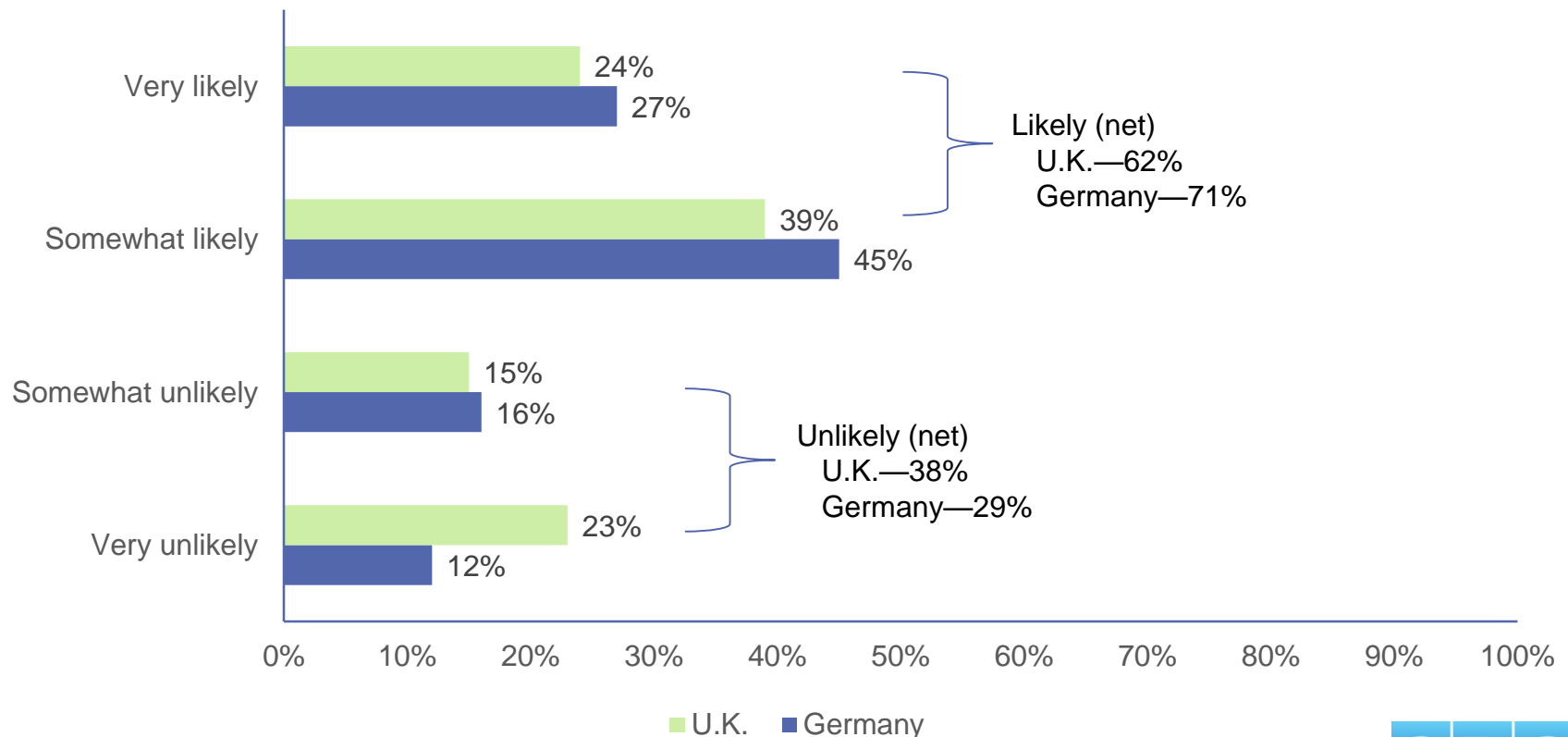
	U.K.					Germany				
	18-24	25-34	35-44	45-54	55+	18-24	25-34	35-44	45-54	55+
Likely (net)	23%	17%	11%	12%	5%	27%	24%	13%	6%	11%
Very likely	6%	4%	2%	1%	1%	3%	4%	2%	1%	1%
Somewhat likely	17%	13%	10%	11%	3%	24%	20%	10%	5%	10%
Unlikely (net)	77%	83%	89%	88%	95%	73%	76%	87%	94%	89%
Somewhat unlikely	29%	32%	26%	28%	21%	28%	32%	31%	28%	24%
Very unlikely	48%	51%	62%	60%	74%	45%	43%	56%	66%	65%

W3: If you traveled to Iceland, how likely would you be to choose to eat at restaurants that serve whale meat dishes or choose to visit supermarkets that sell whale meat? (Base=Total, U.K.= 1,001, Germany = 1,000)

Likelihood of Taking Whale-Watching Tour

Many Would Be Interested In Taking A Whale-Watching Tour

- Over 60 percent in the U.K. and over 70 percent in Germany would be likely to take a whale watching tour if they travelled to Iceland
 - About 1 out of 4 adults in each country indicate that they are very likely

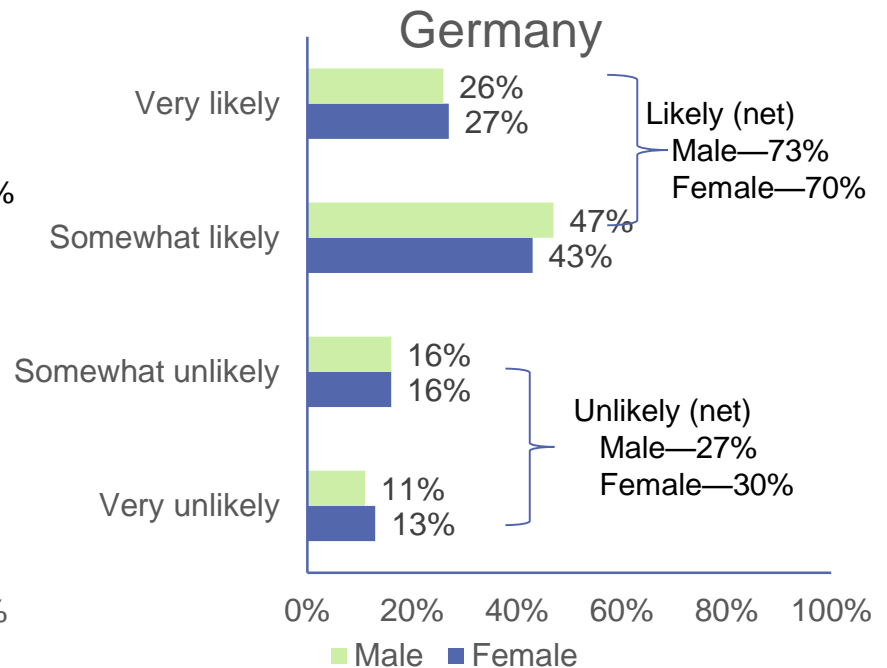
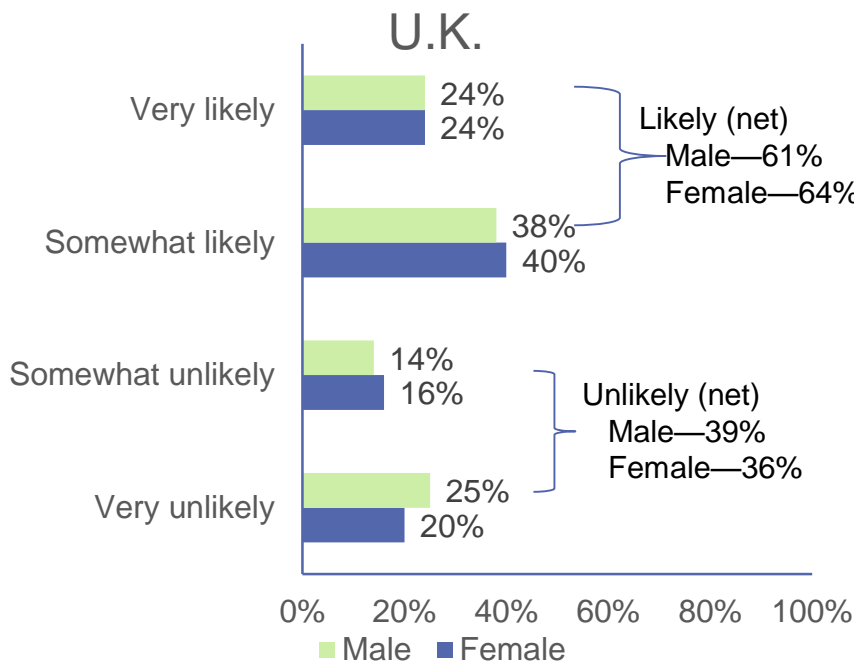


W4: If you travelled to Iceland, how likely are you to take a whale-watching tour? (Base=Total, U.K.= 1,001, Germany = 1,000)

Likelihood of Taking Whale-Watching Tour

Most Are Likely To Take Whale-Watching Tour

- At least 3 out of 5 adults in the U.K. and at least 7 out of 10 adults in Germany would be likely to take a whale-watching tour if they travelled to Iceland
 - Equal percentages of males and females in the U.K. (24%) and nearly equal percentages in Germany (Males—26%, Females—27%) indicate that they would be very likely



W4: If you travelled to Iceland, how likely are you to take a whale-watching tour? (Base=Total, U.K.= 1,001, Germany = 1,000)

Likelihood of Taking Whale-Watching Tour

More Than Fifty Percent In Each Age Group Likely To Take Tour

- Over half of respondents in each age group indicate being likely to take a whale-watching tour if they traveled to Iceland.
 - Most likely are people age 45-54 in the U.K. (69%) and those age 35-44 in Germany (77%), while those least likely are people age 55+ in the U.K. (42%) and those age 18-24 in Germany (33%)

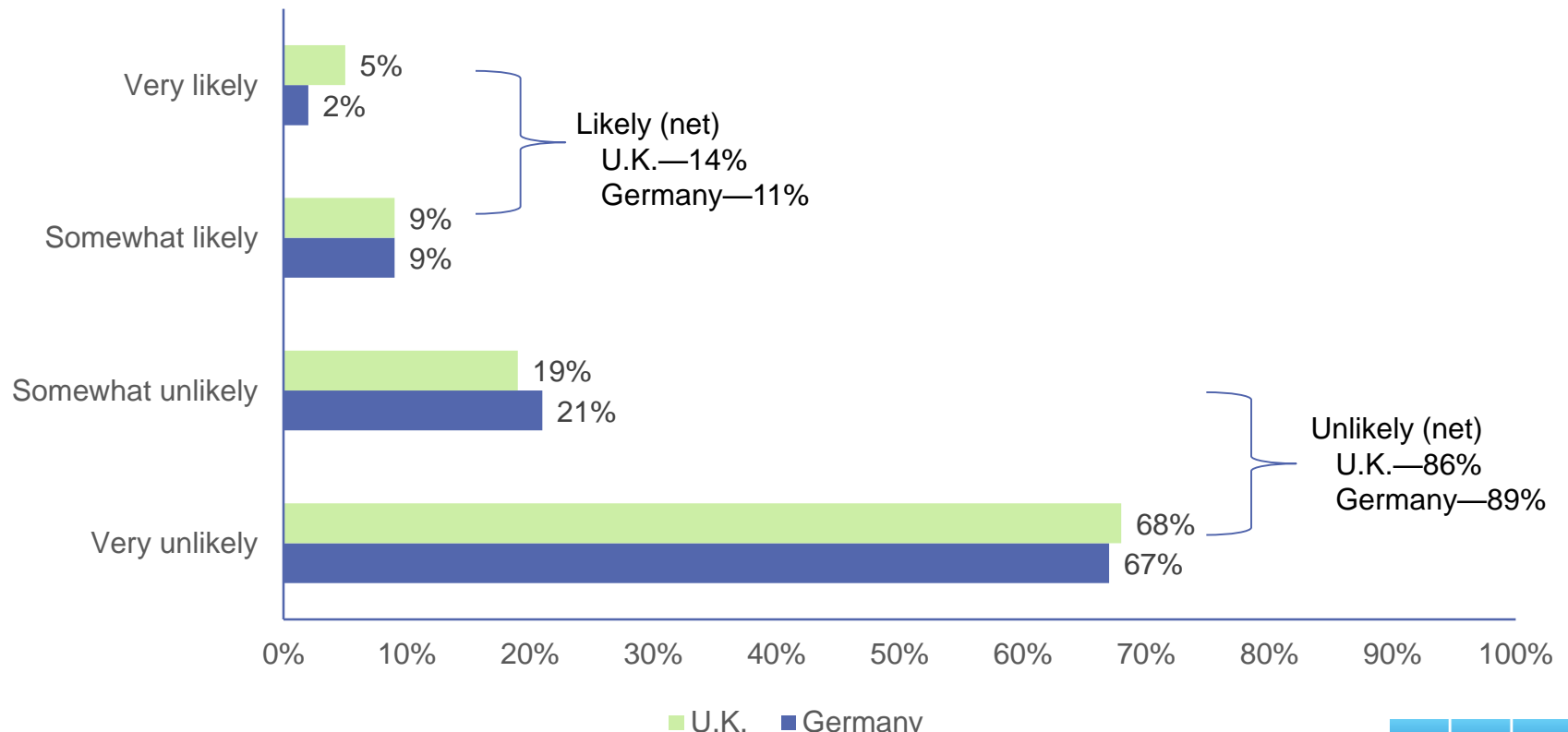
	U.K.					Germany				
	18-24	25-34	35-44	45-54	55+	18-24	25-34	35-44	45-54	55+
Likely (net)	62%	63%	64%	69%	58%	67%	69%	77%	75%	69%
Very likely	18%	28%	26%	29%	20%	12%	26%	26%	30%	29%
Somewhat likely	44%	35%	38%	40%	38%	55%	43%	51%	45%	41%
Unlikely (net)	38%	37%	36%	31%	42%	33%	31%	23%	25%	31%
Somewhat unlikely	23%	14%	15%	11%	15%	23%	19%	11%	13%	17%
Very unlikely	15%	23%	21%	20%	27%	10%	12%	12%	11%	13%

W4: If you travelled to Iceland, how likely are you to take a whale-watching tour? (Base=Total, U.K.= 1,001, Germany = 1,000)

Likelihood of Taking Whale-Watching Tour Near Whaling Operation

Large Majority Are Unlikely To Take Whale-Watching Tour Near Whaling Operation

- Close to 9 in 10 indicate they are unlikely to take a whale-watching excursion if there was a possibility of seeing whales being killed or dead whales being transported back to shore
 - Almost equal percentages in the U.K. (68%) and Germany (67%) indicate being very unlikely

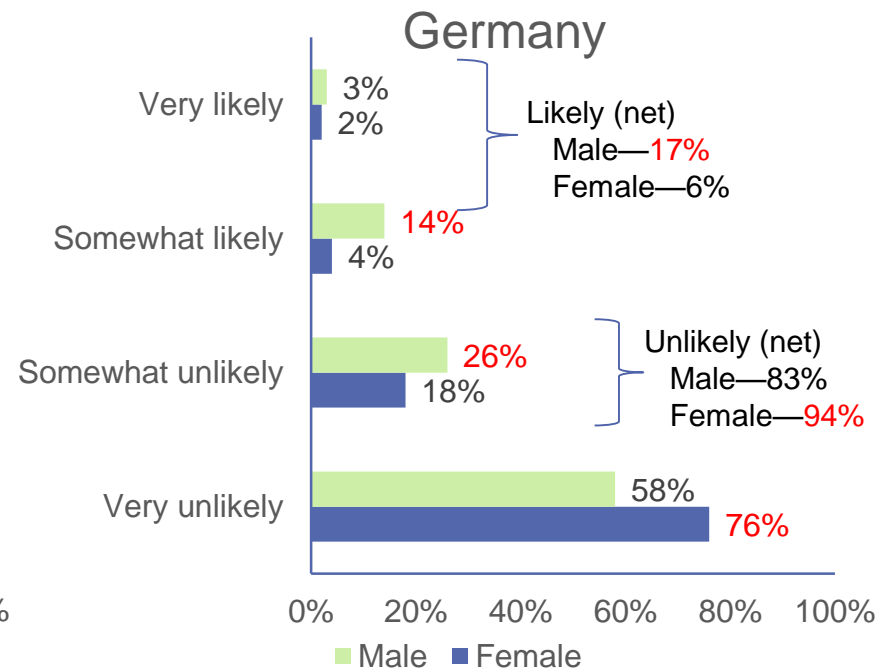
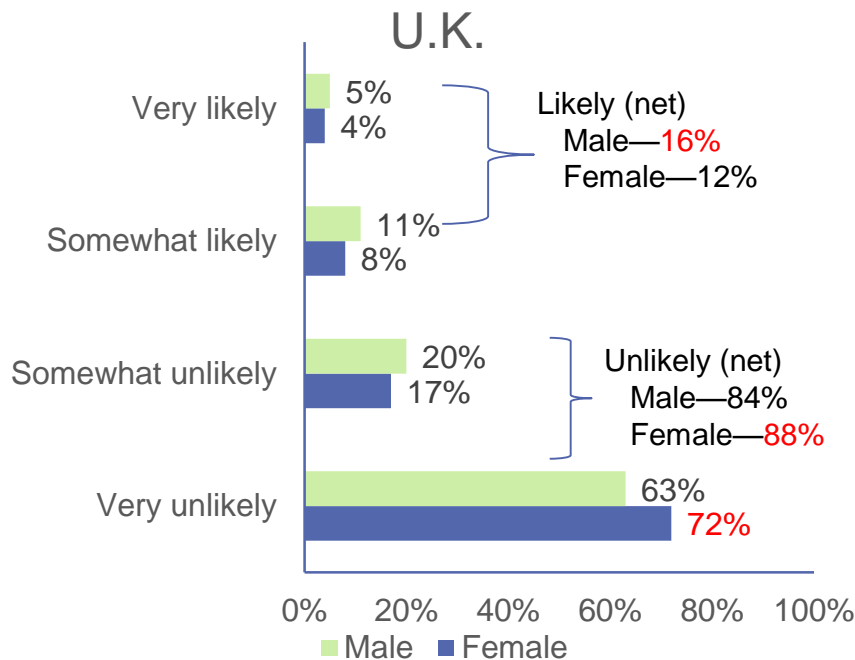


W5: How likely would you be to take a whale watching excursion, if there was the possibility that you might see a whale being killed, or dead whales transported back to shore, while on the whale-watching trip? (Base=Total, U.K.= 1,001, Germany = 1,000)

Likelihood of Taking Whale-Watching Tour Near Whaling Operation

Most Unlikely To Still Participate In Whale-Watching Excursion

- Over 4 out of 5 adults in each country would be unlikely to still participate in a whale-watching tour with the risk of seeing whales being killed or dead whales transported back to shore
 - In both countries, a significantly higher percentage of females indicate being very unlikely (U.K.—72%, Germany 76%)



W5: How likely would you be to take a whale watching excursion, if there was the possibility that you might see a whale being killed, or dead whales transported back to shore, while on the whale-watching trip? (Base=Total, U.K.= 1,001, Germany = 1,000)

Likelihood of Taking Whale-Watching Tour Near Whaling Operation

Older Respondents Least Likely To Take Whale-Watching Tour Near Whalers

- Ninety-two percent of those age 55+ in the U.K. and 91 percent of those age 45+ in Germany indicate being unlikely to take a whale-watching excursion near a whalers
 - Those age 55+ in the U.K. are significantly more likely than all other age groups to indicate being very unlikely

	U.K.					Germany				
	18-24	25-34	35-44	45-54	55+	18-24	25-34	35-44	45-54	55+
Likely (net)	21%	20%	16%	14%	8%	16%	19%	13%	9%	9%
Very likely	5%	7%	5%	6%	3%	3%	7%	3%	-	1%
Somewhat likely	16%	14%	11%	8%	5%	13%	12%	10%	8%	8%
Unlikely (net)	79%	80%	84%	86%	92%	84%	81%	87%	91%	91%
Somewhat unlikely	26%	24%	18%	21%	12%	28%	32%	23%	19%	17%
Very unlikely	53%	56%	66%	65%	80%	56%	50%	64%	73%	74%

W5: How likely would you be to take a whale watching excursion, if there was the possibility that you might see a whale being killed, or dead whales transported back to shore, while on the whale-watching trip? (Base=Total, U.K.= 1,001, Germany = 1,000)